



The McIntire Investment Institute
McIntire School of Commerce - University of Virginia
miiuva.com

December 10, 2018

McIntire School of Commerce
Center for Investors and Financial Markets
Rouss and Robertson Halls

To the McIntire School of Commerce:

Since its founding in 1994 from a \$100,000 grant from Professor John Griffin, the McIntire Investment Institute has been educating generations of students passionate about investing. MII emphasizes fundamental investing through a disciplined research process, and we instill these skills in our members to carry on our organization's legacy. Our mission is to help our members find their passion and interests in investing, and we do so through a rigorous training program as well as hands-on, active management of our portfolio by our members.

This semester, MII reached a milestone \$1 million in assets under management, which is a testament to both the strength of our organization's legacy as well as our membership. Even still, we understand that the fundamental purpose of our organization, and of the assets in our Fund, is to continue and promote the culture of investing at the University of Virginia. We recognize the critical relationship between MII and the whole of the McIntire community, as well as our organization's role in educating and preparing the next generation of investors studying at our University. Aside from the support we give our members, MII has traditionally fulfilled this role through contributions in support of the School; since inception, MII has donated a total of \$250,000 to McIntire.

In 2019, as the University prepares to celebrate its Bicentennial and MII marks its 25th anniversary, we feel that there is no better time to give back than the present. **To commemorate these milestones, MII is honored to give \$500,000 in support of the McIntire School of Commerce and the Center for Investors and Financial Markets as a token of our gratitude.** We are grateful for the support that McIntire and the University have given to MII, as well as the generosity of Professor Griffin, whose donation in establishing MII in 1994 has allowed students—past, present, and future—to find their passion in investing. Our contribution represents MII's net gains of nearly 100% over the last four years. We hope that it can be used to aid students and faculty at McIntire in pursuing passions, interests, and academic advancements within business, finance, and investing.

We would like to thank all the members of MII, past and present, and our Fall 2018 management team: Chris DeSouza, Ronald Diu, Marisa Lombardi, Joanna Shaw, Donny Waymire, Josh Blutfield, Ken Pentimonti, Aneesh Reddy, Richard Song, and James Cane. MII was so successful over the course of its history because of the tireless commitment by our members and portfolio managers. After a successful 25 years, we are very optimistic that MII will come out even stronger for the next 25 years to come.

All the best,

Anthony Nathan Lin
President, McIntire Investment Institute
anl5ef@virginia.edu

Abhijith (AJ) Chaganti
Chief Investment Officer, McIntire Investment Institute
arc3zu@virginia.edu

Our Proposal

The McIntire Investment Institute proposes a gift of \$500,000 to be allocated as follows:

A) A \$350,000 gift to the McIntire School of Commerce to help support the John A. Griffin Fellowship in Finance

The premise of a student-run investment organization such as MII would not have been possible without our fund's initial \$100,000 contribution by Professor Griffin in 1994. We are incredibly grateful for Professor Griffin's generosity to MII, and his gift allowed MII to grow into the thriving organization and community that we see today. With MII managing over \$1 million in assets and our weekly meeting programming reaching over 100 members each semester, Professor Griffin's legacy continues to leave a very tangible impact on both the McIntire and University community.

We decided that as such, it is only appropriate to honor Professor Griffin's legacy on the 25th anniversary of the McIntire Investment Institute. MII proposes a gift of \$350,000 to the McIntire School of Commerce as an initial investment for an endowment to sponsor a faculty fellowship in finance in honor of Professor Griffin: the John A. Griffin Fellowship in Finance.

This gift will support the McIntire School of Commerce and its faculty in pursuing scholarly work and academic advancements in fields related to finance. We hope this fellowship will give McIntire an additional avenue in recognizing its top faculty, allowing them to continue pursuing their research interests.

B) A \$150,000 gift to the Center for Investors and Financial Markets to help sponsor dialogue and scholarly advancements by supporting finance seminars and Center research priorities

The Center for Investors and Financial Markets offers students opportunities both inside and outside the classroom to learn more about the financial markets and opportunities within the industry. We are excited by the interest in finance generated by the Center, both from students at McIntire as well as from individuals across all years from across the University who are interested in investing or involved with investment clubs.

Alongside the Richard A. Mayo Center for Asset Management at the Darden School, part of the Center's work is hosting a research seminar series, allowing leading academics from around the globe to share their research, particularly in areas such as finance and economics. We recognize the importance of these research seminars as it relates to scholarly advancements in finance and economics, and believe that this series is an important part of the Center's mission in advancing both research and teaching within McIntire.

We hope that the gift of \$150,000 would be able to sponsor this series of research seminars by supporting the costs of hosting such events on Grounds, as well as support any additional research priorities within CIFM.